
SECTION VIII - PROPOSAL FORMAT

A. INTRODUCTION

This section contains instructions and prescribes the Mandatory Proposal Format for the development and presentation of Bidder's RFP response. Format instructions must be adhered to, all requirements and questions in the RFP must be responded to, and all requested data must be supplied. There is no intent to limit the content of the bid. Additional information deemed appropriate by the Bidder and their proposed solution must be included. However, cluttering the proposal with irrelevant material only makes the evaluation more difficult. Do not include testimonials about products in the requirement responses. These may be included in Volume IV - Literature. It is the responsibility of the Bidder to respond in the prescribed format ensuring the California Office of the Secretary of State (SOS) Evaluation Team can locate all response information.

Proposals must address the requirements in Section V - Administrative Requirements and Section VI - Project Management, Business, and Technical Requirements in the order and format specified in these sections. The proposal must respond to all requirements. Each RFP requirement response in the proposal must reference the unique identifier for the requirement in the RFP (e.g. Requirement A1, Requirement S2.2, etc.).

Page numbers must be located in the same page position throughout the proposal. Figures, tables, charts, etc., must be assigned index numbers and must be referenced by these numbers in the proposal text. Figures, etc., must be placed as close to text references as possible. All pages in the proposal must be consecutively numbered, and must be standard 8.5x11" paper (except charts, diagrams, etc., which may be foldouts). If foldouts are used, the folded size must fit within the 8.5x11" format. Each volume of the various proposal submissions must be provided separately in an appropriate sized binder.

It is the Bidder's responsibility to ensure its proposal is submitted in a manner that enables the Evaluation Team to easily locate all response descriptions and exhibits for each requirement of this RFP.

The following must be shown on each page of the proposal:

- RFP SOS 0890-46
- Name of Bidder
- Proposal Volume Number and Page Number
- Proposal Part or Exhibit Number

The proposal package must be completely sealed. All proposal package submissions must be clearly labeled "RFP SOS 0890-46". Submissions must be identified as the proposal, or Cost Data (cost data must be sealed and submitted separately from the proposal) and include the Bidder's name and return address.

Bidders should be sure that no pricing information of any type is shown in their Draft and Final Proposal, except in the sealed Volume III - COST DATA envelope. The inclusion of pricing in any fashion or format in any other place in the proposal may result in immediate rejection of the bid (e.g. "provided at no additional cost...., etc."). Any product supporting literature containing costs or rates (such as catalogs, maintenance service rates, etc.) submitted as part of the proposal must have all cost figures replaced with "XXXX."

B. FINAL PROPOSAL FORMAT AND CONTENT

Failure to clearly identify the proposal on the outside of the package may result in the rejection of the proposal. (SOS) and the Department of General Services (DGS) are not responsible for receipt of any Final Proposal, which is improperly labeled and accepts no responsibility for lost and/or late delivery of Final Proposals. In this RFP, the following sections contain forms, required information to be provided by the Bidder, or requirements that must be responded to in order to be compliant:

- RFP Section I – Bidder's Intention to Submit a Proposal (Exhibit I.A) and signed Confidentiality Statement (Exhibit IC);
- RFP Section V – Bidder response to Administrative Requirements;
- RFP Section VI – Bidder response to Project Management, Business, Technical, Reporting Strategy, and Technical Architecture Requirements; and
- RFP Section VII – Cost Tables and unredacted Letter of Bondability.

The complete proposal must be submitted in the format and numbers of copies indicated, and include the following items:

1. **Volume I—Response to Requirements**

1 Master copy and ~~10~~14 copies

This volume must contain all responses to the **ADMINISTRATIVE REQUIREMENTS** (RFP Section V), and **PROJECT MANAGEMENT, BUSINESS AND TECHNICAL REQUIREMENTS** (RFP Section VI) of the RFP. All forms and questionnaires, **EXCEPT for cost data**, must be completed and included in this volume. The organization is to be as follows:

Section 1 — Cover Letter (RFP Section V, Requirement A1)

Section 2 — Executive Summary (RFP Section V, Requirement A2)

Section 3 — Administrative Requirements Response (RFP Section V, Requirements A3 through 12), Exhibit V.5

Section 4 — Project Management, Business and Technical Response: RFP Section VI.B and D (Project Management Activities and Plans P1 through P17), RFP Section VI.F (VoteCal System and optional VoteCal Election Management System (EMS) Business Requirements), RFP Section VI.G (Reporting Strategy), RFP Section VI.H (VoteCal Architecture), and RFP Section VI.I (Technical Requirements)

Section 5 -- ~~Project Team Experience~~ (RFP Section VI.E, Requirements P18 through P20)

Section 6 – RFP Section VII Detail Cost Tables **with all cost data omitted**: Table VII.2 – VoteCal System One-Time Hardware List; Table VII.3 – List of VoteCal System One-Time Platform Software To Be Purchased or Licensed. If the optional VoteCal EMS is proposed, Bidder must also include Tables VII.12a through VII.12g – Optional VoteCal EMS hardware lists; Tables VII.13a through VII.13g – Optional VoteCal EMS platform software lists.

2. **Volume II — Completed Contract**

1 Master copy and ~~10~~4 copies

This volume must contain the complete Contract Terms and Conditions and all Attachments, complete in every detail. The Standard Form 213IT must be signed. If the VoteCal EMS is being proposed, the completed contract Terms and Conditions and all Attachments for that option must be included under a separate tab.

3. Volume III — Cost Data

1 Master copy and ~~10~~ 4 copies

This volume **must** be in a **separately sealed, marked envelope or container** containing all completed cost sheets and any other document with cost data identified as required in this RFP. The organization is to be:

Section 1— VoteCal System Summary Cost Table (Cost Tables VII.7, 8 and 17 – if applicable)

Section 2 — VoteCal System Detail Cost Tables from RFP Section VII (Cost Tables VII.1 through VII.6)

Section 3 — All Other Exhibits and Documents with Cost Data Identified (Cost Table VII.9) and unredacted Letter of Bondability

Section 4 – Detailed Cost Tables for the VoteCal EMS (Optional Cost Tables VII.10 through 17)

4. Volume IV — Literature

~~1 Master copy and 10 copies~~

Technical documentation for platform software & hardware: 1 Master copy and 1 copy
All other documentation: 1 Master copy and 4 copies

This volume must contain all technical and other reference literature the Bidder deems necessary to support the responses to the requirements of this RFP. **This volume must be tabulated so that the various reference materials can be located for evaluation purposes.**

5. Electronic Response Requirements

One (1) CD must be included with Volume I containing all of Volume I response data in electronic form, and one (1) CD must be included with Volume III containing all cost data (separate sealed with the Volume III hardcopy and not in PDF format).

C. DRAFT PROPOSAL FORMAT AND CONTENT

The Draft Proposal must contain all the material specified above for the Final Proposal **except cost figures**. The costs should all be indicated with “XXX”. The completed contract (Appendix A), including Attachment 1 (Statement of Work) **must also be included with products and services identified, but no cost figures included.** The contract need **not** be signed at this point. It is **important that all cost tables with all entries except cost figures**, be included. The number of copies of the Draft Proposal to be submitted for validation is as follows:

Volume I — Master copy and 10 copies

Volume II — Master copy and 10 copies

Volume III — Master copy and 10 copies

Volume IV— Master copy and 10 copies